

# Briefing

## Food and agriculture, urban

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## Policy pointers

### The relationship

between rising urbanisation and reliance on food imports is particularly evident in West Africa, although it affects a relatively small number of staple foods.

### Three key elements of

food systems (local/small and medium enterprises, importers, national/agro-industry) are interconnected. Any understanding of what people eat must integrate how food products of different origins (local, regional and imported) are combined and where food is bought and consumed.

### Informal value chains

and markets play a pivotal role for both the urban and rural poor, but there is a gap between the perception and reality of food safety in local, informal markets.

### Smallholder farmers,

small-scale processors and transformers, and informal sector traders and vendors in local food systems must respond to changing consumer tastes and strengthen their capacity to engage in policy dialogue at both national and local levels.

# Urbanisation, changing tastes and rural transformation in West Africa

Between 1950 and 2000, the total population of West Africa increased fourfold, with almost one third now living in urban centres.<sup>1</sup> Alongside growing urbanisation, many countries in the region increasingly rely on food imports for certain staples. These imports mix with local and regional foods to create a complex food system in terms of how and where food is purchased and consumed. Indeed, imported food may actually be integrated within traditional meals. At a workshop in Dakar, Senegal, participants reviewed current knowledge on these trends and how they affect low-income groups. They agreed that informal actors such as small-scale food processors and producers must develop greater capacity to meet evolving consumer demands, as well as health and safety standards. Decision makers must recognise informal actors as key players in food systems; for their part, informal actors must develop skills to engage more effectively in policy dialogue.

At a December 2014 workshop in London, participants laid the groundwork for a new understanding of food security. They identified key issues such as changes in consumption patterns in both urban and rural settings; the importance of mapping the origins of food; the blurred boundaries between rural and urban areas and the implications for food; the need for more inclusive policymaking; and the rise of the informal sector.

Building on these themes, IIED, Agricultural Research for Development (CIRAD) and Initiative Prospective Agricole et Rurale (IPAR) held a follow-up workshop in Dakar, Senegal in May 2015, the first of three planned regional workshops. The 30 participants, who explored emerging food security trends as they affect West Africa, were based primarily in Senegal.

Participants also came from Benin, Burkina Faso, Cameroon, France, Mali and the United Kingdom.

For workshop participants, the region of West Africa is emblematic of the relationship between rising urbanisation and reliance on food imports. Over the past five decades, the proportion of the region's total population living in areas classified as urban has more than quadrupled, from 7.5 to 31.5 per cent.<sup>1</sup> At 24 per cent, the average value of food imports in West Africa is more than twice that of other regions in sub-Saharan Africa.

Landlocked countries in the Sahel with growing urban populations, such as Burkina Faso, Mali and Niger, are particularly reliant on a relatively small number of staple items including rice, oils and milk.<sup>2</sup> In the Gambia, more than half of the population lives in cities. The country imports

## *Changes in food consumption in West Africa are affecting what, how and where people eat*

more than one third of its food; of this amount, the share of cereals is more than 40 per cent.<sup>3</sup>

While the dominance of cereals in food imports is a major concern, participants argued it takes up

too much space in policy debates. They suggested it was equally necessary to focus on other key issues, such as what, how and where people are eating; where food comes from and how different elements of the food

system interact; and the need to build capacity of local actors, including around policy dialogue.

### **Understanding what, how and where people eat**

Food consumption patterns are changing in West Africa, affecting what, how and where people eat. But these patterns cannot be reduced to simple graphs showing the growing reliance on food imports. West Africans combine local, regional and imported foods to prepare their meals. For example, a staple like maize, millet or rice can be served with a high-protein sauce (fish, chicken, sheep). These combinations offer the possibility of integrating local foods with imports, and substituting ingredients to please the local palate. Indeed, use of cassava is growing in the Sahel based on imports from coastal countries as well as from increased production in the northern Sahel. These complementary trends are contributing to the emergence of a 'regional' diet in the Sahel.

Consumption patterns must also be viewed in the context of whether people eat inside or outside the home. In Cotonou, Benin, 'outside food' takes up just 6 per cent of family food budgets.<sup>4</sup> In other cities the percentage is much higher, rising to 27 per cent in Yaoundé, Cameroon and 33 per cent in Abidjan, Côte d'Ivoire.<sup>2</sup>

People in rural areas also eat outside the home, which speaks to how distinctions in consumption patterns between rural and urban areas are collapsing. Moreover, the statistics for food consumed outside the home do not include meals prepared by small-scale suppliers or from modern restaurant chains. These meals, by their nature, can be consumed on the street or at home, either with the family or individually.

The growth in demand for ready-made dishes is not necessarily linked to a desire for more imported products. Meals prepared by individual or small-scale processors using traditional methods and recipes can feature both imported ingredients (rice, chicken, milk, bread) as well as

local ones (cassava, yams). Consequently, these small-scale suppliers may be helping preserve the use of local products.

In fact, the rise in meals prepared outside the home also has implications for the preservation of traditions. Many families don't have time to follow traditional African recipes, which require extensive preparation or a relatively large number of ingredients. Moreover, knowledge of how to cook these meals is no longer systematically transferred between generations. Initial studies in Burkina Faso suggest that artisanal meals are helping to sustain traditional African meals in the home, although more research in this area is needed.<sup>5</sup>

### **Where food comes from**

Workshop participants identified three key food sub-systems — local/small and medium-sized enterprises (SMEs), importers and agro-industry — which must be viewed through the lenses of food origin and destination, the degree of transformation and preparation involved, and the categories of actors involved in these stages, as well as the distribution channels.

**Local enterprises/SMEs.** This sub-system revolves around the consumption of local products in two ways: households can buy unrefined local products and then prepare them, or they can buy processed or prepared products that are ready to eat. Either way, smallholder farmers provide the raw materials, which are distributed through commercial networks by informal operators. Formal operators may help to market local produce, such as dairy products, cassava chips or millet flour, prepared by the emerging medium-scale agro-food industries.

Typically, the formal sector has registered companies that pay taxes and are officially counted in a nation's gross domestic product (GDP). In contrast, the informal sector generally operates on a small scale with little or no division of labour or capital for production, and relies more on casual labour linked to family and social networks rather than contracts.

Within the informal system, rural and urban traders generally exchange and distribute products to small-scale restaurants or transformers in one of three states: non-perishable, lightly processed (shelled, hulled or husked) or perishable (fruits and vegetables). Many of these transformers are also part of the informal sector, but formal SMEs are emerging as well. These enterprises are adopting mechanised processes to create more standardised products (milled flour, ready-to-eat corn) that are sold through a common distribution system alongside imports and products from local agro-industry.

**Importers.** This sub-system involves raw or processed food that has been treated for direct consumption (e.g. rice, refined oil, frozen chicken, tropical fruit or preserves). These foods are generally distributed by importers that supply wholesalers, intermediaries and networks of shops in small and large urban centres and in large villages.

Over the past 15 years, modern chain stores (supermarkets and mini-markets) attached to shopping centres have been growing in West Africa. That said, these chain stores have less market share than in other parts of sub-Saharan Africa, such as Kenya or South Africa. Moreover, they feature products that are similar to those found in small shops. Supermarkets target medium- and high-income consumers, although families with modest incomes also shop there for hard-to-find products such as cosmetics.

The concentration of wealthier households with upwardly mobile lifestyles in specific areas affects the spread of supermarkets. In Abidjan, the growing influence of supermarkets is forcing neighbourhood shops to post prices. By abandoning over-the-counter service in favour of self-service shelves, these shops are transforming into true mini-markets.

**Agro-industry.** This sub-system is organised around agro-industrial units and enterprises in each country. It includes classic transformation industries geared towards exporting tropical food such as cocoa, coffee, fruit and out-of-season vegetables. These enterprises transform raw materials from plantations connected to the industrial unit or from a family farm into basic food for export. Although these products have historically been geared towards export markets, some products, such as oil and vegetables, are further refined and distributed locally in supermarkets or small shops. Local retailers sometimes allow stores to sell damaged or defective food products.

Within this sub-system, family farms are increasingly getting involved in cooperatives that can generate better access to markets and more stable prices. These cooperatives allow family farms to transcend their limited capacity to meet the demands of exacting clients concerned about the traceability and origin of food. On a logistical level, cooperatives select products and train farmers to achieve standards required for the agro-industrial sub-system. They also play an essential role in contract agriculture (terms of agreements, training and communication) between family enterprises and downstream operators, transformation units, distributors and exporters.

### Box 1. Building capacity of women street vendors

Attention to the informal sector, which plays such an important role in urban food security, must go beyond rules and regulations. In Dakar, Senegal, close to 48 per cent of households buy food at least once a day from women street vendors who live in suburbs such as Rufisque. These services could pose a potential public health risk: most of the vendors are illiterate and prepare their foods without following basic rules of hygiene. After being trained in hygiene and nutrition, the women successfully lobbied the municipal government for canteens where they could prepare their foods more safely.<sup>i</sup> For workshop participants, this success story underscored the importance of changing the discourse on the informal sector.

<sup>i</sup> ASTM (18 December 2012) Quand les femmes du Sénégal s'activent. <http://astm.lu/quand-les-femmes-du-senegal-sactivent>.

Agro-industrial enterprises prioritise local markets, but may eventually want to target an entire region. Raw materials come either from global markets (e.g. wheat to make flour, unrefined oil), from plantations integrated into transformation units (e.g. industrial sugar), or from family farms (e.g. tomatoes to make concentrate). Their transformed products are generally sold in small shops, and the most widely consumed (tomato concentrate, powdered milk, oil) are also sold in the market place. The array of products from agro-industrial operators complements products imported by central buying agencies for distribution in supermarkets and/or mini-markets.

**A dynamic system.** The three sub-systems are not isolated from each other. For example, informal distribution systems handle local products, imports or the products of agro-industry. Workshop participants identified the need to better estimate the relative weight of the different sub-systems, how they interact, and how and where value added and jobs are created. A 2011 study estimated that the informal sector in Senegal (of which food is a part) contributes 38 per cent to GDP, commerce activities make up 29 per cent of the informal sector, and transformation represents 17 per cent of informal activities.<sup>6</sup> These numbers suggest that informality is a crucial dimension of food security in the region.

### Building more synergy in the food system

Participants explored the need for family farmers to respond to evolving demands of the food system, the need to build capacity of informal actors, and the need to promote engagement between informal actors and local decision makers.

**Meeting evolving demands.** Increasingly, food in rural areas is bought and sold. With surplus food sold to the urban market, subsistence farming has become less relevant. To maintain and grow their market share, small producers must respond to evolving consumer preferences and demands. As one response, the General Union of Producers in Méckhé, Senegal highlighted the importance of food storage at the village level. This can help communities manage their produce more effectively, selling food at the optimal time for maximum profit. Access to investment in water infrastructure (e.g. solar energy for pumps) is seen as an opportunity to diversify local production, moving it from a reliance on animal breeding, legumes and cassava to the development of market gardens that meet local demand.

A pilot project to refine peanut oil in Méckhé is part of a strategy to create value added in rural areas. It enables village-based producers of unrefined oil to obtain the same quality offered by local agro-industry or imports. The extension of this project in the Groundnut Basin is constrained, however, by the incapacity of these small, rural agro-industries to meet industry standards; they also need permission from the Ministry of Commerce to distribute the oil. In urban areas, women preparing food for school children are confronted with the same kinds of regulatory obstacles. SMEs that package local products to suit urban consumer demands don't have direct access to modern distribution chains. Instead, their products are distributed by companies with connections to central purchasing centres. This undermines the capacity of SMEs to maximise returns on their investment and knowledge.

Many pilot projects are already addressing technical constraints or lack of investment capacity through innovation, training and credit. But mastering the regulatory environment and ensuring access to a distribution network remain major challenges that undermine the emergence of strong SMEs and agro-industrial industry. Ideas for addressing these concerns range from building capacity of informal actors to developing supportive regulations.

**Building capacity.** Over the past two decades, resources for professional producer

organisations have allowed them to become established actors in policy dialogue. A similar goal should be pursued for informal actors. So far, non-governmental organisations (NGOs) and research institutions have been leading the way. In Benin, for example, capacity building focuses on promoting innovation and improved health sanitary conditions. These activities, however, are not always sustainable. And there is no representative organisation in place to help improve the capacity of informal actors to take part in policy dialogue. As a result, regulations are difficult to change. Still, workshop participants highlighted several positive examples (see Box 1).

**Promoting policy dialogue.** Certain issues remain national in scope (standards; policies for trade, food and agriculture). But there is still a need to decentralise decision-making bodies to promote greater participation of intermediary actors in policy debate — at least at local levels where the politics are less complex. This would enable these actors to become integrated in the food system. Decision makers should demonstrate political will by welcoming informal actors into policy dialogue.

### Food for thought

Participants at the Dakar workshop agreed on several points, but in particular on a number of issues that need to be addressed:

**Rural residents** need to be recognised within food markets as both producers/sellers and consumers/buyers.

**Informal sector actors** need to be better recognised and integrated into policy debates at all levels, from production to distribution.

**The knowledge base** — including researchers, practitioners and civil society — needs to be strengthened to allow greater engagement in broad-based debates on food-related policies.

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## Notes

<sup>1</sup> Denis, E and Moriconi-Ebrard, F (2011) Dynamique de l'Urbanisation 1950-2020 en Afrique de l'Ouest. Africapolis/Agence Française de Développement, Paris. / <sup>2</sup> Bricas, N and Tchamda, C 'Que nous apprennent les enquêtes nationales sur les consommations alimentaires des ménages?' Paper presented at Consommation alimentaire, urbanisation et les transformations rurales en Afrique de l'Ouest, Dakar, 4-6 May 2015. / <sup>3</sup> World Bank WDI and FAOSTAT. / <sup>4</sup> Fogny, INF 'Cas de Bénin.' Paper presented at Consommation alimentaire, urbanisation et les transformations rurales en Afrique de l'Ouest, Dakar, 4-6 May 2015. / <sup>5</sup> Cheyins, E *et al.* (2015) 'Liens entre pratiques habitantes des citadins et pratiques alimentaires à Ouagadougou, Bilan thématique programmée, production agricole et sécurité alimentaire en Afrique de l'Ouest'. Paper presented to Atelier de restitution, Ouagadougou, 29-30 April 2015. / <sup>6</sup> ANSD (2013) Enquête nationale sur le secteur informel au Sénégal. Final Report, Dakar.